ENTERING CLIENT RELATIONSHIPS

CREATION DATE: May 25, 2007



Pointers to Remember:

- 1. Relationship information is client specific and should be entered for each client in FACES.NET.
- 2. Relationships can be identified and entered on the Relationships screen for the given client.
- 3. Caretakers for clients are identified on the Relationships screen.

Steps include:

- Step 1: Place a case in focus by clicking on the word My Assignments from the left window pane.
- Step 2: Highlight the identified case from the Workload List.
- Step 3: Click on Show.

Referral Case Cli	ent Provider	Admin	_	_	_	_	Case	~	60
Admin 🖸 System Administratio	n 🖳 Workload Tra	nsfer 🛛 Staff 🗅 Traii	ning 🖻 Fin Ac	min 🖯 Aler	ts File Cab	inet 🛛 Man	agement Rep	orts More	Ð
Organizer Focus History	WorkLoad List								
• WorkLoad	* Denotes Require	d Fields 🛛 🔭 Denotes H	alf-Mandatory	Fields ‡De	notes AFCAR	6 Fields			
t My Assignments	Case / Intake	/ Other Listing							
± My Workers		,							
t Other Program Areas	Program Area*	0.000.20							
	FACESNET TRAI	NING		*					
My Calendar	Unit								
⊆ June 2006 ≥	ADMIN, T Tra	ining ADMIN 1760		*					
S M T W T F S	Workers								
<u>28 29 30 31 1 2 3</u>	TRAINER, ADMI	N		*					
4 <u>5 6 Z 8 9 10</u>									
11 12 13 14 15 16 17	Sort By: [>								
18 19 20 21 22 23 24	ID	Restricted Type	Responsib	Referral T	Name	Client	Date Assig	Open Date	Resp. Time
25 26 27 28 29 30 1	192587	Case	Family		JACKSON57	SHANTE JAC	01/10/2006	01/10/2006	
2 3 4 5 6 7 8	192586	Case	Family		JACKSON43	SHANTE JAC	01/10/2006	01/10/2006	
Mu Tacke	• 192585	Case	Family		JACKSONU2	SHANTE JAG	01/10/2006	01/10/2006	
TTY TUSKS	192584	Case	Family		JACKSUNSE	SHANTE JAC	01/10/2006	01/10/2006	
	192583	Case	Family		JACKSONU4	SHANTE JAC	01/10/2006	01/10/2006	
and the second se	192582	Case	Family		JACKSUN53	SHANTE JAC	01/10/2006	01/10/2006	
	192581	Case	Family		JACKSON52	SHANTE JAC	01/10/2006	01/10/2006	
	192580	Case	Family		JACKSON51	SHANTE JAC	01/10/2006	01/10/2006	
	192579	Case	Family		JACKSONSU	SHANTE JAC	01/10/2006	01/10/2006	
	192578	Case	Family		JACKSON55	SHANTE JAC	01/10/2006	01/10/2006	
	192577	Case	Family		JACKSON54	SHANTE JAC	01/10/2006	01/10/2006	~
-00-									
	*** Indicates Re	stricted or *A* Indicate	s Restricted &8	Adoption S	ecurity or 'A'	Indicates Ac	loption Secur	ity	
	Show	ceload Transfer	Summary	Edit N	ame	Print			
EACESNET			barnindi y						
I A C L S.N L I	Re Co	ntacts Assign/	riranster	Close (Case	ancel A	lerts		

Figure 1

Step 4: Hold cursor over the Case drop down menu, and Client.

Step 5: Click Clients List.



Figure 2

Step 6: Highlight the identified client from the Client Selection list.

Step 7: Click Show.

Name	Client ID	Age	Gender	DOB	Duplicate	
FEMALE SCOTT01	845194		Female	00/00/0000		
KEYSHAWN JACKSON01	845193		Male	00/00/0000		
LAKEISHA JACKSON01	845198		Female 00/00/0000			
LATONYA HOLMES01	845197		Female	00/00/0000		
MALTREATER UNKNOWN01	845200	845200		Male 00/00/0000		
PAUL WILLIAMS01	845192		Male	00/00/0000		
REYSHAWN JACKSON01	845195		Male	00/00/0000		
RODNEY SCOTT01	845199		Male	00/00/0000		
SHANTE JACKSON01	845191	32	Female	04/21/1975		
Active Clients All Clients Show Search Cancel						

Note: The selected clients' name you select here will populate to the Client 2 field on the Client Relationship Case screen.



- Step 8: Hold cursor over the Case drop down menu, and then Client.
- Step 9: Click Relationships.



Figure 4

Step 10: Select Client 1* from the pick list.

Referral Case Clie	ent Provider Admin	3			_	Case	~	Go			
Case D Client D Client List	Summary General Info Der	mographics <mark>Relationships</mark>	CKL 🖻 Chi	ld Fatality	More 🛛						
Organizer Focus History O In Focus	Client Relationships Case * Denotes Required Fields ** D	Denotes Half-Mandatory Fields	‡Denotes	AFCARS Field	ls						
User Name: TRAINER 001	Relationships										
Entity Type: Case Entity Name:	Client 1	Relation	Start Date End Date Ca		Caretaker	Paternity I	Estab. D	ate Estab.			
	SHANTE JACKSON01	Mother (Biological)			Yes						
JACKSON01 Entity ID: 192566											
Entity Type: Client Entity Name: FEMALE SCOTT01											
Entity ID: 845194	Relationship Information										
	Client 1*	Relationship with C	Relationship with Client 2* Client 2								
	SHANTE JACKSON01 Mother (Biological)										
	Clent 1 is the Caretaker*										
	Dates Paternity of Client 2										
	Start	Paternity Esta	Paternity Established 🛛 Court order in process for establishment of paternity								
14	End	Date Established	Date Established								
	New Save Cancel										

Figure 5

Step 11: Select the relationship from the Relationship with Client 2* pick list.



- Step 12: Complete the Client 1 is the Caretaker* field.
- Step 13: Click Save.

Note:

- When a relationship is identified and the record is saved, FACES.NET will create the reciprocal relationship to that client in the identified Client 1 record.
- The Client 1 is the Caretaker* field must be completed for each record. The worker must answer Yes or No as deemed appropriate. If you answer No then after you have clicked Save, you will get a message box asking you to verify the relationship information between the client and the caretaker.



- Clicking Yes will cause the relationship fields to be updated accordingly.
- Clients listed in the Client 1* pick list are pulling from the Client List screen.
- Client 2 is the client record that is in focus. This field is grayed out.
- All relationships are established or identified to the client that is in focus or appears in the Client 2 field.

If you have any questions, please call the Help Desk at (202) 434-00009.